

HÉBERT

ADVISORY SERVICES, INC.

Professional Portfolio Management *INSTITECH[®] Technical Stock Market Research*

Hébert Advisory Services is an independent money management and stock market research firm specializing in separately managed equity accounts. As a second generation; family owned and operated Registered Investment Advisory firm we have been producing and publishing our *INSTITECH[®]* research since 1968 and successfully managing equity portfolios since 1975.

Our belief:

Investor's long-term goals can best be served by equity ownership of viable business enterprises and that common stocks provide the greatest opportunity for investment growth.

Our mission:

Provide our clients with profitable, better than market portfolio returns, maximizing long-term capital appreciation.

We do this with active portfolio management using our specialized INSTITECH[®] Research.

INSTITECH[®] was created and developed in the early 1960's by Howard Hébert. Dissatisfied with the limited stock market research available, Howard recognized the need for an investment tool that used a non-emotional approach. Convinced that he could remove a considerable portion of subjectivity involved with stock picking, he built the *INSTITECH[®]* research process.

Timeless in its application, *INSTITECH[®]* provides an accurate mathematical *description* of the market and individual stock price action. That measurement represents how a stock is performing relative to the entire 4200 *INSTITECH[®]* stock universe.

This specialized Comparative Relative Strength analysis answers the question:

"Is this particular stock over or under performing the market and if so – by what degree?"

With this technical answer in hand we overlay independent fundamental research and build solid, broadly diversified portfolios with long-term performance at reasonable risk.

Meet the Hébert Management Team...

Richard L. Hébert, MBA

President, Portfolio Manager

Rick joined the firm in 1999 specializing in portfolio management using the firm's proprietary technical stock market analysis and directs overall portfolio management functions. Rick has over twenty-five years of senior executive experience in financial and business management within the industrial and financial sectors.

Rick earned an MBA, Honors, Finance emphasis, and BS, BA in Finance, Cum Laude from Regis University. He is a member of American Mensa, LTD. Market Technicians Association, Investment Company Institute and the American Association of Individual Investors.

Kimberly (Kiki) Deane

Vice President, Portfolio Manager

Kiki joined the firm in 2008 from the Investment Management and Institutional Trust financial services industry. She has been a Securities and Financial industry professional since 1988. Kiki has extensive experience and responsibilities in Senior Executive Financial Operations Management, Investment Advisory and Portfolio Management with a Business Administration Finance curriculum from Regis University.

Janiece (Jan) Kray

Vice President Systems Administrator

Jan joined the firm in 2006 as Systems Analyst. Jan has over thirty years of IT consulting and computer experience work with business and national non-profit organizations. Jan earned her BS in Technology Management, Cum Laude from Regis University.

Howard J. Hébert, CMT

Co-Founder, Portfolio Management Consultant

Howard began his investment career in 1957 as a retail broker. During the early period of his career he formulated the concept behind INSTITECH, a unique technical analysis of the stock market. Since 1975, he has incorporated the INSTITECH research into Hébert Advisory Services portfolio management discipline.

Howard is a Chartered Market Technician (CMT), a member of the Market Technicians Association, CFA Institute[®] and the New York Society of Security Analysts (NYSSA).

Suzanne M. Hébert, CFA

Co-Founder, Portfolio Management Consultant

Suzanne began her investment career in 1986 and provides equity portfolio consultation for the firm. She is a Chartered Financial Analyst with membership in the CFA Institute[®] and the CFA Society of Colorado. Suzanne graduated with a BS in Finance from the University of Colorado.
